

**CITY OF LODI  
INFORMAL INFORMATIONAL MEETING  
"SHIRTSLEEVE" SESSION  
CARNEGIE FORUM, 305 WEST PINE STREET  
TUESDAY, MAY 4, 2004**

An Informal Informational Meeting ("Shirtsleeve" Session) of the Lodi City Council was held Tuesday, May 4, 2004, commencing at 7:00 a.m.

**A. ROLL CALL**

Present: Council Members – Beckman, Hitchcock, Howard, Land, and Mayor Hansen

Absent: Council Members – None

Also Present: City Manager Flynn, Interim City Attorney Schwabauer, and Deputy City Clerk Taylor

**B. CITY COUNCIL CALENDAR UPDATE**

Deputy City Clerk Taylor reviewed the weekly calendar (filed).

**C. TOPIC(S)**

C-1 "Lodi Care Package Program"

City Manager Flynn reported that while current programs are in place, staff is addressing the Council to obtain guidance toward formalizing and standardizing programs to provide financial assistance to customers who are on fixed incomes and/or have hardships which make it difficult for them to pay for City services.

Electric Utility Director Vallow stated that the inevitable cost of providing services and the recent energy crisis have caused a large segment of the population to be impacted by rate increases. Some customers are annoyed by this, and some customers simply cannot afford to pay for services. While Lodi Electric Utility is mandated and obligated to offer assistance to customers that are below existing Federal Income Guidelines (FIG), other utility assistance programs such as water, wastewater, and refuse are not as clearly defined.

Rob Lechner, Customer Services and Programs Manager, reviewed his overhead presentation regarding a proposed program offering combined assistance entitled, "Lodi CARE" (filed). A partnership has been created by the City of Lodi Electric Utility, Public Works, and Finance Departments, along with Central Valley Waste Services and the Lodi Salvation Army. The program would offer assistance to low-income customers, paying their combined electric, water, wastewater, refuse bill (cap at \$125) once within a six-month period, a maximum of two times in 12 months (cap at \$250 per family per year). The \$105,000 budget estimate allows for the program to assist 336 families twice annually, or 672 families if each received one grant annually. Mr. Lechner related that customer/client relief information was formulated at \$125 maximum based on analyzing historical electric usage for the approximately 1,550 current low-income customers and the average amount charged to resident customers for water, wastewater, and refuse services.

The partnership recommends this item be brought before Council for consideration on May 19, 2004, with a program initiation date of June 1, 2004. Mr. Lechner explained that the proposed budget program would be \$105,000, broken down as follows: \$60,000 from Electric Utility (\$16,000 program administration, \$5,000 customer outreach and materials, \$39,000 electric utility relief component); \$30,000 Public Works water and wastewater relief components; and \$15,000 Central Valley Waste refuse relief component. The Lodi Salvation Army, as program administrator/coordinator, would work with the Finance Department to administer program funds.

Mr. Lechner explained that the Salvation Army was brought into the process and is being recommended to coordinate the program based on its experience as a leading organization providing care and services to those in need. The Salvation Army currently administers the PG&E Relief for Energy Assistance Through Community Help (REACH) program through 170 northern and central California offices and also administers the State/County Home Energy Assistance Program (HEAP) program. The proposed \$16,000 administrative fees paid to the Salvation Army would cover eligibility and screening of customers, phone and personal contact with applicants, and coordinating the billing system with the Finance Department. Eligibility screening may include requiring proof of income of all residents, proper identification of all resident occupants (driver's license, social security number), and other criteria mirroring HEAP and REACH program requirements. Following approval, the Salvation Army would report its findings and the amount of actual financial assistance to the Finance Department to initiate the appropriate transfer of funds and to the Electric Utility Department for follow-up. Either Mr. Lechner or Customer Services and Programs Coordinator Kathy Brown would then contact the customer to coordinate a free, in-home energy audit to assist and train residents in the use and conservation of energy and to provide additional information with regard to refuse reduction, recycling, and water/wastewater conservation opportunities.

Council Member Land asked how many programs customers can qualify for and how often they need have to requalify. He also shared his concern for support programs evolving into entitlement programs. Mr. Vallow explained that customers can qualify for the Single Household Alternative Rate for Energy (SHARE) and Senior Fixed Income (SFI) (for customers over age 62), as well as the recommended Lodi California Alternate Rates for Energy (CARE). While little changes with regard to eligibility or income for SFI customers, SHARE customer eligibility is reviewed about every two years. Lodi CARE recipients would be reviewed each time they applied so no maintenance monitoring would be necessary, only comparison monitoring at time of application. Mr. Vallow stated that customers can qualify for all of these programs. Council Member Land stated he would support the free, in-home energy audit and dissemination of information regarding other conservation ideas being mandatory, and confirmed that these visits would meet the criteria for outreach public benefit programs. Additionally, Council Member Land reported that statistics show that 17% of Lodi's population is in poverty level and Lodi is the second highest in San Joaquin County, with Stockton being first. Most families receiving assistance are mothers raising small children age 5 or under, and the majority of the problem is irresponsible fathers. He stated that while he cannot regulate social issues, he can help low-income families and seniors on fixed incomes with limited finances.

Mayor Hansen stated he sees the program as providing assistance should someone on very low income be further burdened by a financial hardship such as an illness or medical problem requiring new medications, making it a decision between paying their utility bill and getting the medication and care they needed. The program would give them the opportunity to apply for assistance in that type of crisis. Mr. Lechner supported Mayor Hansen's comments, interjecting that the Lodi CARE program would not impact customers currently participating in low-income assistance programs, but rather is geared to further assist families and individuals struggling, as well as helping customers cope with financial hardship or emergency situations. He stated he was surprised by Council Member Land's statistics regarding the poverty level in Lodi and its status in the county, and stated he is concerned that Lodi's high cost of rental properties and the lack of low-cost housing are major factors, especially for single parent and single-income households.

At the request of Council Member Howard, Mr. Vallow further explained that Lodi CARE is presented to supplement customers currently involved in low-income assistance programs but still have difficulty keeping up on their bills. Many end up having their utilities turned off, vacating the area, and leaving bills unpaid which must then be written off at year end. The program is not for those who will not pay their utility bill, but for those who cannot, either because of a low-income issue or due to an emergency or crisis situation.

Council Member Hitchcock stated she was in favor of the proposed verification process and supported the Salvation Army administering the program. She asked that specifics be provided outlining the criteria to be used to screen applicants to ensure eligibility and how the program will be monitored. Mr. Vallow shared that it will serve the City additionally to have the Salvation Army administering the program, since it can use the data collected in coordinating other programs to verify, monitor, and cross-check customer information. This pilot program is not an ongoing discounted rate program, but a more immediate, short-term solution to a crisis or emergency financial situation. He further stated that the City will learn much about the diversity and needs of the community through its partnership with the Salvation Army, and detailed that the dollars from the City to support the program will come from Public Works and Electric Utility mandated funding, and that Central Valley Waste will pay its portion of the program directly from its profits. Council Member Hitchcock stated she supports the City's alliance with the Salvation Army for customer support programs rather than giving the entire dollar amount which might be construed as the City making a donation.

Council Member Beckman stated that he is not comfortable with the City coordinating programs, but would consider giving the Salvation Army the \$105,000 estimated customer assistance budget to administer however it sees fit. Mr. Vallow stated that the City's billing system lacks the technical infrastructure to allow for that, and as a pilot program, the City wants a more hands-on approach in working with the Salvation Army to verify the effectiveness of the program, from the initial application to the in-home information and energy audits.

City Manager Flynn commented that prior to referring customers to existing programs, staff attempts to work with customers in a crisis situation to determine if they can delay payment or make payments over time to help them work through the crisis. The program comes into play when this process repeats and becomes a social issue that the City is not qualified to deal with. At that point the Salvation Army would step in with its experience and expertise to handle the situation. He described the program where citizens could donate funds to an account to assist other customers in need, with the Salvation Army regulating it; however, participation was low, perhaps due to poor communication. He stated that Lodi residents currently utilize several programs supported by the county, state, and PG&E, but there is a lack of communication regarding program availability. Mr. Vallow added that getting the word out is vital through literature, churches, civic groups, and networking, and staff believes that a check of the City's internal database will show that approximately 1/3 of those who apply for Lodi CARE will be qualified to participate in the SHARE program, but do not because they are unaware of its existence. This is another way of getting people involved and getting citizens the assistance they need.

Tom Sanchez, representing Central Valley Waste Services, stated it participates in programs such as Lodi CARE throughout the country and he is pleased to be involved in partnership with the City to assist customers and provide information to conserve energy and resources and to reduce refuse.

Serena Woods, representing the Lodi Salvation Army, described the qualification process currently performed in screening potential fund recipients. Customers must complete a prescreening form with all pertinent information, explain their situation and specific need for assistance and their emergency or crisis situation. An internal investigation of the application is completed, a follow-up phone call interview is made, and then a face-to-face interview of approximately 30 to 45 minutes is conducted, at which time the client must provide current proof of income, medical and miscellaneous bills, prescriptions, etc. that support their financial situation and application.

Public Works Director Prima provided copies and a short review of the City's current discount program application forms, as well as a draft recommendation for a Water/Wastewater/Solid Waste Utility Discount Program (filed). Mr. Prima stated he would return to Council on May 19, 2004, to provide an outline of staff recommendations, including

1) one unified set of criteria for program eligibility, 2) updated application forms to assist customers in providing complete and detailed information for program consideration, 3) program monitoring procedures with regard to continued eligibility and computer-generated billing to clearly indicate customer costs and program funding resources, and 4) funding estimates and budget sources. He stated that currently the Supplemental Security Income (SSI) or Supplemental Security Payments (SSP) applicant process is simple in that the customer completes it, SSI reviews and verifies information, and the form is returned to the City to begin customer assistance; however, it is limited in its assistance to the customer. In addition, billing information is currently listed as "other charges" and indicates various discounts, but provides no details regarding programs, funding, and specific discounts and charges to give a true and accurate picture of customer account activity. Additionally, discounts do not apply to the entire bill, and staff recommends that this be revised. Currently, market cost is not included, and the rate increase a few years ago for water wastewater rates has never been included in the discount. Mr. Vallow noted that many customers would under normal circumstances be eligible for assistance, but landlords often charge a flat rental fee including utilities, which negates the renters from applying for assistance.

Mayor Hansen preferred modifications to include offering customer discounts which apply to the total utility bill, not just a portion. He stated that when contacted by a citizen recently, they reported that their utility bill discount total was \$2.15. Mayor Hansen suggested that the percentage of the impact be reflected on the bill and that the statement modified with a breakdown of billing, discounts, and program assistance details.

Council Member Hitchcock stated she liked the SSI/SSP monitoring process for its efficiency and simplicity and would like to see the City's proposed process in detail to include qualifying new customers and auditing existing customers for continued program participation. She further stated that in qualifying for SHARE, which is based on federal income guidelines, she believes the City can help more people with more funds than through the SSI/SSP program, but also reflected that while even with all these opportunities, some customers will still not be eligible for assistance because they cannot provide the proper information for verification.

Council Member Land stated that if it were possible to retain the necessary information, a good way to learn someone's true income would be to review their federal income tax filing, which would show earned income, other income, and dividends. He further stated that in following FIG Financial Advisory Services, the City of Lodi may be entitled to have access to that information for verification of program eligibility.

Maxine Cadwallader, Revenue Manager stated that she is very supportive of the Salvation Army's involvement in administering the program because many citizens are discouraged and overwhelmed by the forms that accompany requests for assistance. She stated the follow-up calls and personal interviews conducted by the Salvation Army as part of the process will greatly assist the public and promote the program success.

**D. COMMENTS BY THE PUBLIC ON NON-AGENDA ITEMS**

None.

**E. ADJOURNMENT**

No action was taken by the City Council. The meeting was adjourned at 8:20 a.m.

ATTEST:

Jacqueline L. Taylor  
Deputy City Clerk

## Mayor's & Council Members' Weekly Calendar

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### WEEK OF MAY 4, 2004

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#### Tuesday, May 4, 2004

- 7:00 a.m.                Shirtsleeve Session  
                              1. Lodi Care Package Program (EUD/PW)
- 5:30 - 7:00 p.m.      Grand Opening and Ribbon Cutting of Robin's Nest, 665 West Turner Road.

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#### Wednesday, May 5, 2004

- 7:00 p.m.                City Council Meeting.  
                              (Note: Closed Session begins 5:15 p.m.)

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#### Thursday, May 6, 2004

- 4:00 – 8:00 p.m.      **Hansen.** Open House of P. Gill Obstetrics and Gynecology Medical Group, Inc., 999 South Fairmont Avenue
- 5:00 – 7:00 p.m.      **Hansen, Howard, and Land.** LOEL Center 28<sup>th</sup> Annual Volunteer Recognition social, 105 South Washington Street.
- 5:30 - 7:00 p.m.      Grand Opening and Ribbon Cutting of Keys' Guild Street Grille and Bar, 171 South Guild Street.
- 6:30 – 8:00 p.m.      **Hansen, Howard, and Land.** Christian Community Concerns God and Country Prayer Rally, Veterans Plaza, 221 West Pine Street

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#### Friday, May 7, 2004

- 4:00 p.m.                Special Closed Session Meeting.

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#### Saturday, May 8, 2004

- 10:00 a.m.              Special Closed Session Meeting.

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#### Sunday, May 9, 2004

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#### Monday, May 10, 2004

*Disclaimer: This calendar contains only information that was provided to the City Clerk's Office.*

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Lodi City Council Shirtsleeve Session  
May 4, 2004

**TOPIC:**

**Proposed Lodi CARE Package**

- The proposed Lodi CARE Package has been developed to assist Lodi residents that are below the existing Federal Income Guidelines. The package will assist these customers with paying their monthly City of Lodi utility bill
  
- Proposed start date: June 1, 2004

➤ A partnership has been created to fund and/or coordinate this new program:

- City of Lodi Electric Utility
- City of Lodi Public Works
- City of Lodi Finance Department
- Central Valley Waste (C.V.W.)
- Lodi Salvation Army



- Proposed budget: \$105,000
  
- Several members of the partnership will fund the program:
  - Electric Utility: \$60,000
  - Public Works: \$30,000
  - C.V.W.: \$15,000

- Electric Utility will fund the program administration costs (\$16,000), the customer outreach & material preparation costs (\$5,000), as well as the electric utility relief component (\$39,000)
- Public Works will fund the water and wastewater relief components (\$30,000)
- C.V.W. will fund the refuse relief component (\$15,000)
- The Lodi Salvation Army is the proposed program coordinator and administrator

## ➤ **WHY utilize the Salvation Army?**

- This organization currently administers PG&E's REACH program through its 170 northern and central California offices
- This organization currently administers the state/county H.E.A.P. program
- Salvation Army is recognized statewide, and nationally, as a leading organization providing care and services to those in need
- Administrative Cost: \$16,000 (the Salvation Army has proposed this budget: 20 hours/week @ \$16.00/hour= \$1,333/month)

## ➤ **How does the proposed program work?**

- Customer/client eligibility and screening is performed on site at the Lodi Salvation Army office on Lockeford Street
- If approved, the Salvation Army notifies the City of Lodi Finance department of customer assistance and amount of relief
- Lodi Finance staff inputs information into billing system
- Salvation Army ALSO notifies Electric Utility of approved customers
- EVERY approved customer in the Lodi CARE Package Program will then receive a free, in-home energy audit, as well as other information services

## ➤ **Customer/client relief information:**

- Maximum relief amount is \$125 (amount was derived by analyzing historical electric usage data for customers currently on the low-income electric rate, and the average amount charged to residential customers for water, wastewater and refuse)
- Relief opportunities – once every 6 months; maximum two times in 12 months (\$250 per family maximum)
- If each family qualified for, and needed two relief payments annually, we could assist 336 families total on the proposed budget (672 families if each received one grant per year)

➤ **Federal government income guidelines:**

- 1-2 persons      \$23,000
- 3 persons      \$27,000
- 4 persons      \$32,500
- 5 persons      \$38,000
- 6 persons      \$43,500

(add \$5,500 for each additional person)

➤ **PROPOSED Lodi CARE Package income guidelines:**

- 1-2 persons \$16,000
- 3 persons \$20,000
- 4 persons \$25,500
- 5 persons \$31,000
- 6 persons \$36,500

**NOTE:** The income guidelines are reduced in the Lodi CARE Package to assist those customers below the published federal income guidelines

- Of the total proposed program budget, 80 percent is dedicated to customer relief payments (20% is for program administration and related material costs)

- **Program marketing:**

- Utility bill inserts
- Lodi Utility News newsletter
- Salvation Army and other local service clubs (B&G Club, Lodi House, S.J. County United Way, etc)
- Other – TBD



- Representatives – C.V.W., Salvation Army, Public Works, Finance
- Questions? Suggestions?

## Water/Wastewater/Solid Waste Utility Discount Program

### Issues / Draft Recommendation

- Eligibility Criteria
  - Varies with program and utility
  - Electric – SHARE program for low income
  - Electric – Sr./Fixed Income
  - Water, Wastewater & Solid Waste – per ordinance (Social Security payments)
  - Solid Waste – separate low-income eligibility criteria
  - Basically self-certifying
  - Periodic review, renewal
  - Bill information
- Discount Amount
  - Can vary among utility services
  - Include surcharges?
  - Present Discounts (approx. # of customers):
    - Electric SHARE – approx. 20% (actually a separate rate) (1,300)
    - Electric Sr./Fixed Income – 5%, not incl. MCA (130)
    - Water SSI/SSP – 10%, not incl. infrastructure repl. (300)
    - Wastewater SSI/SSP – 10%, not incl. infrastructure repl. (300)
    - Solid Waste SSI/SSP – 10%
    - Solid Waste (separate rate) – now gone (900)
- Draft Recommendations for discussion:
  - One set of eligibility criteria:
    - Use Electric SHARE and Sr./Fixed Income
    - Include Infrastructure Replacement charge in calculation (affects W, WW only)
  - Discount Amounts:
    - Electric – no change
    - PW Utilities:
  - | Program          | Service: | Water | Wastewater | Solid Waste |
|------------------|----------|-------|------------|-------------|
| “SHARE”          |          | 20%   | 20%        | 30%         |
| Sr./Fixed Income |          | 10%   | 10%        | 10%         |

(Customer could qualify under one program, not both)
- Options
  - 1. Leave As-Is
  - 2. Leave Eligibility Criteria As-Is, change discount percentages
  - 3. Modify per Draft Recommendation
  - 4. Modify per Draft Recommendation with different discount percentages
  - 5. Eliminate Discounts

*Susan Hitchcock*

MAYOR

*Emily Howard*

MAYOR PRO TEMPORE

*John Beckman*

COUNCIL MEMBER

*Harry D. Hansen*

COUNCIL MEMBER

*Keith Band*

COUNCIL MEMBER



## City of Lodi

CITY HALL, 221 WEST PINE STREET  
LODI, CA 95240  
(209) 333-6700  
FAX (209) 333-6807

*H. Dixon Flynn*

CITY MANAGER

*Susan J. Blackston*

CITY CLERK

*Randall A. Hays*

CITY ATTORNEY

### APPLICATION FOR REFUSE RATE REDUCTION or BACKYARD SERVICE

NAME: \_\_\_\_\_ TELEPHONE: (209) \_\_\_\_\_

ADDRESS: \_\_\_\_\_, LODI, CA 9524\_\_

NUMBER OF PERSONS LIVING AT RESIDENCE: \_\_\_\_\_

CITY OF LODI UTILITY ACCOUNT NUMBER: \_\_\_\_\_

Please indicate by checking box(es):

☐

I am disabled and need "backyard" service. The trash collector will roll my cart(s) to the truck. No other person in my household is capable of moving the cart(s) to the curb.  
PLEASE ATTACH APPROPRIATE PROOF OF DISABILITY such as a statement from your physician, or any card/letter identifying you as a disabled person.

☐

I am applying for a reduction in the residential refuse collection rate due to personal economic hardship. Total income from all sources and all persons at residence:  
\$\_\_\_\_\_ per year.

NOTE: You must meet criteria established by the City of Lodi to qualify as a low-income earner and receive a rate reduction.

PLEASE ATTACH PROOF OF ELIGIBILITY such as Supplemental Security Income (SSI), State Supplemental Payments (SSP), Temporary Assistance to Needy Families (TANF), a copy of a Social Security check, or other appropriate documentation.

I certify the above information is true and correct.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

Return this form with documentation proof to Marilyn Haro, Lodi City Hall, 221 W. Pine St., PO Box 3006, Lodi, CA 95241-1910. If you have questions, please phone Marilyn at (209) 333-6793. If you reach the answering machine, please leave a message and your call will be returned as soon as possible.



## SSI & SSP RECIPIENTS

### YOU MAY QUALIFY FOR A WATER, SEWER, AND REFUSE RATE LOW INCOME DISCOUNT

If you receive Supplemental Security Income (SSI) or Supplemental Security Payments (SSP), you may be eligible for a 10% discount on your water, sewer, and refuse charges, from the City of Lodi.

Please complete the attached release and return to:

City of Lodi Finance Department  
City Hall Annex  
212 West Pine Street  
Lodi, California  
Telephone: 209/333-6719

#### Information Release Authorization City of Lodi Finance Department

Customer Name:	Telephone Number:	Application Date:
Social Security Number:	Utility Account Number:	
Customer Street Address, City, State Zip Code:		
I hereby authorize the Social Security Administration to release my SSI or SSP eligibility status and residence address to the City of Lodi.		
CUSTOMER SIGNATURE: X _____		
Do not write below this line. For social security administration use only.		
To Social Security Administration: Please verify that this person is eligible for SSI or SSP.		<input type="checkbox"/> Yes <input type="checkbox"/> No
When completed, please return to:  City of Lodi-Finance Department Post Office Box 3006 Lodi California 95241-1910	Verified by:	



**City of Lodi – Senior Fixed Income**  
Residential Certification Application

**CITY OF LODI CUSTOMER INFORMATION**

*Please Type or Print*

City of Lodi Customer of Record Account Number – (for example 12345)

Daytime Telephone Number- (Area Code first)

Name – As it appears on your City of Lodi Utility Bill

Date of Birth

Home Address – Do NOT Use a P.O. Box

Mailing Address – If different from above address

**Senior Fixed Income Discount Guidelines:**

Your household's gross income must not exceed \$45,000 annually AND you must be over 62 years of age. Fixed income must be the majority (at least 80%) of total income. The intent of this program is to give a discount to customers who primarily are on a fixed income and are senior citizens. Qualified applicants are not eligible for any other discount by the City of Lodi for their electric bill. To qualify the following checklist must be followed:

- ✓ Applicant must be the City of Lodi Customer of Record.
- ✓ Applicant may not be claimed as a dependent on another person's tax return.
- ✓ Applicant must attach to this application documentation showing that current income for all people living in the home does not exceed the income guideline limits. Application is considered incomplete without this documentation. (See back for examples of Proof of Income).
- ✓ Applicant must notify the City of Lodi Finance Department within 30 days of becoming ineligible for this discount.

**HOUSEHOLD INCOME INFORMATION: (Proof of Income Must Be Included With Your Application)**

"Fixed Income of Household" means all money and non-cash benefits, available for living expenses, from all fixed income, both taxable and non-taxable, before deductions for all people who live in my home. This is limited to: Child/Spousal support; Interest dividends or withdrawals from savings accounts, or retirement accounts such as IRA, pensions, retirement accounts and 401K accounts; Social Security; Veterans, disability or unemployment benefits and workers compensation; AFDC; SSI; SSP; Cash public assistance; Food Stamps and free housing or utilities; School grants, loans scholarships, or other aid.

Income considered not fixed includes but is not limited to the following: wage and salary income, commissions, business income, gains and income from stock, bonds, property and other assets, lottery and non retirement plan annuities.

**The Fixed Income Worksheet on the reverse must be completed to prove income qualification.**

**DECLARATION (Please Read Carefully and Sign Below)**

By signing below, I certify under penalty of perjury that the above provided information is true and correct under the laws of the State of California. I understand that the City of Lodi reserves the right to request verification of continued economic need at any time, and I will notify the City of Lodi Finance Department of any changes that affect my eligibility. I understand that the City of Lodi has the right to re-bill me at the applicable rate if appropriate.

X

City of Lodi Customer of Record Signature

☐ check if guardian or power of attorney

DATE

**CITY OF LODI CUSTOMER SERVICES**

**209-333-6719**



# City of Lodi - Senior Fixed Income Residential Certification Application

## CITY OF LODI Fixed Income Worksheet

*Please Type or Print*

### HOUSEHOLD INCOME WORKSHEET: (Proof of Income Must Be Included With Your Application)

#### GROSS YEARLY FIXED INCOME OF HOUSEHOLD

+AFDC \$ \_\_\_\_\_  
 +Food Stamps \$ \_\_\_\_\_  
 +SSI / SSP \$ \_\_\_\_\_  
 +SSA \$ \_\_\_\_\_  
 +Pensions / Annuity/401k/IRA \$ \_\_\_\_\_  
 +Interest Income \$ \_\_\_\_\_  
 Total Fixed Income (sum of above) \$ \_\_\_\_\_ (A)

#### GROSS YEARLY NON-FIXED INCOME

+Wages/Commissions \$ \_\_\_\_\_  
 +Stock/Bond Income\* \$ \_\_\_\_\_  
 +Business Income \$ \_\_\_\_\_  
 +All Other Income \$ \_\_\_\_\_  
 Total Non-Fixed Income (sum) \$ \_\_\_\_\_ (B)

Total Annual Income (add A & B) \$ \_\_\_\_\_ (Must be less than \$45,000 to qualify)  
 Line Above X 80% = \$ \_\_\_\_\_ (Line A must be greater than this line to qualify)

\*Outside Retirement Plans such as 401k, Company sponsored plans

### Instruction Sheet

*This program provides for a monthly discount of 5% on your City of Lodi Electric Bill. The City of Lodi will use the completed application, along with income documentation you provide, to determine if your household meets the following fixed income guidelines. Should you qualify, your discount will appear as soon as practicable after the completed application has been received and verified. The City of Lodi will occasionally contact you to verify that your need for the program has not changed.*

#### Proof of Income

*The City of Lodi will use documentation you provide to determine whether your household qualifies under the income guidelines listed above. You must submit CURRENT PROOF OF INCOME for everyone receiving money in your household. Your application is considered incomplete without this documentation. The City of Lodi will contact you for updated income information if your documentation is incomplete or not current.*

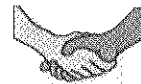
The following are examples of documentation you can submit as proof of your household income:

- **Agency Assistance:** Intake documentation from local agency showing household income and agency contact information.
- **Aid to Families with Dependent Children (AFDC):** Notice of Action; Computer printout; Benefit letter; Copy of check.
- **Child and/or Spousal Support:** Copy of check.
- **Disability Compensation:** Copy of current check; Printout from agency or insurance company verifying amount.
- **Federal Tax:** Form 1040 and accompanying worksheets (Schedule C, E, and Form 2555); Forms W-2 for all wage earners.
- **General Assistance:** Notice of Action from County Social Services; Copy of current check.
- **Interest Income:** Monthly or quarterly bank statement; Statement of interest income from bank or agency.
- **Pay Check Stubs:** Current stub(s) covering at least two months and showing gross income.
- **Pension and Annuities:** Copies of current check; Annual statement from pension plan.
- **Self-employed:** Federal Tax Forms 1040 and Schedule C; Two recent bank statements showing personal income.
- **Social Security:** Copy of current check(s); Notification from bank of direct deposit.
- **Supplemental Security Income (SSI):** Notice of Planned Action; Notification from bank of direct deposit.
- **Supplemental Security Payment (SSP):** Notice of Planned Action; Notification from bank of direct deposit.
- **Student Aid:** Financial Aid statement from College or University.
- **Support from an individual:** Copy of check and statement signed by person providing support.
- **Unemployment Benefits:** Copy of current check; Printout from Employment Development Department.
- **Veteran's Benefits:** A letter indicating receipt of Veteran's Pension; Copy of VA check.
- **Other Sources of Income:** Documentation of other money received by your household and used to pay your monthly bills.

**PLEASE NOTE:** Unaltered documents should be submitted. Originals will not be returned.



City of Lodi - Single Household Alternative Rate for Energy (SHARE) Program  
Single Family Program



**CITY OF LODI CUSTOMER INFORMATION**

*Please Type or Print*

City of Lodi Customer of Record Account Number – (for example 12345)

Name – As it appears on your City of Lodi Bill

Home Address – Do NOT Use a P.O. Box

Mailing Address – If different from above address

Daytime Telephone Number – Please indicate Area Code

Number of People Living in Household

**SHARE PROGRAM GUIDELINES**

- ✓ Applicant must be the City of Lodi Customer of Record.
- ✓ Applicant may not be claimed as a dependent on another person's tax return.
- ✓ Applicant must attach to this application documentation showing that current income for all people living in the home does not exceed the income guideline limits. Application is considered incomplete without this documentation. (See Instruction Sheet for examples of Proof of Income).
- ✓ Applicant must notify the City of Lodi Finance Department within 30 days of becoming ineligible for SHARE.
- ✓ Tenants of Sub-Metered Mobile Home Parks must use the Sub-Metered Application. (See Landlord/Manager or contact the City of Lodi Finance Department for an application).

**HOUSEHOLD INCOME INFORMATION: (Proof of Income Must Be Included With Your Application)**

SHARE "Gross Yearly Income of Household" means all money and non-cash benefits, available for living expenses, from all sources, both taxable and non-taxable, before deductions for all people who live in my home. This includes, but is not limited to: Wages, salaries and commissions; Self-employment; Child/spousal support; Interest dividends or withdrawals from savings accounts, stocks and bonds, or retirement accounts such as IRA and 401K accounts; Stocks; Bonds; Business or rental income, support from family or friends; Cash gifts, loans; Lottery winnings; Tax refunds and money from insurance policies or legal settlements; Social Security; Retirement, veterans, disability or unemployment benefits and workers compensation; AFDC; SSI; SSP; Cash public assistance; Food Stamps and free housing or utilities; School grants, loans scholarships, or other aid.

**GROSS YEARLY INCOME OF HOUSEHOLD**

AFDC	\$ _____	+ Pensions / Annuity	\$ _____
+ Food Stamps	\$ _____	+ Wages	\$ _____
+ SSI / SSP	\$ _____	+ Interest Income	\$ _____
+ SSA	\$ _____	+ Other Money used to Pay Bills	\$ _____
		<b>= Total Income</b>	<b>\$ _____</b>

**DECLARATION (Please Read Carefully and Sign Below)**

By signing below, I certify under penalty of perjury that the above provided information is true and correct under the laws of the State of California. I understand that the City of Lodi reserves the right to request verification of continued economic need at any time, and I will notify the City of Lodi Finance Department of any changes that affect my eligibility. I understand that the City of Lodi has the right to re-bill me at the applicable rate if appropriate. I understand that this information may be shared with my other energy utility, if applicable.

X

City of Lodi Customer of Record Signature

☐ check if guardian or power of attorney

DATE

**CITY OF LODI CUSTOMER SERVICES**

**209-333-6719**



## City of Lodi - Single Household Alternative Rate for Energy (SHARE) Program Single Family Program



### SHARE Program Instruction Sheet

Enclosed is an application for the Single Household Alternate Rates for Energy (SHARE) Program. This program provides for a monthly discount of 20% on your City of Lodi Electric Bill. The City of Lodi will use the completed application, along with income documentation you provide, to determine if your household meets the following income guidelines. Should you qualify, your discount will appear as soon as practicable after the completed application has been received and verified. The City of Lodi will occasionally contact you to verify that your need for the program hasn't changed.

### **SHARE INCOME GUIDELINES**

Your household's gross income must not exceed the SHARE Income Guidelines

<u>Number of Persons in Household</u>	<u>Maximum Annual Household Income</u>
1-2	\$ 22,000
3	\$ 25,900
4	\$ 31,100
Each additional member	\$ 5,200

### Proof of Income

The City of Lodi will use documentation you provide to determine whether your household qualifies under the income guidelines listed above. You must submit **CURRENT PROOF OF INCOME** for everyone receiving money in your household. Your application is considered incomplete without this documentation. The City of Lodi will contact you for updated income information if your documentation is incomplete, or not current.

The following are some examples of documentation you can submit as proof of your household income:

- **Agency Assistance:** Intake documentation from local agency showing household income and agency contact information.
- **Aid to Families with Dependent Children (AFDC):** Notice of Action; Computer printout; Benefit letter; Copy of check.
- **Child and/or Spousal Support:** Copy of check.
- **Disability Compensation:** Copy of current check; Printout from agency or insurance company verifying amount.
- **Federal Tax:** Form 1040 and accompanying worksheets (Schedule C, F, and Form 2555); Forms W-2 for all wage earners.
- **General Assistance:** Notice of Action from County Social Services; Copy of current check.
- **Interest Income:** Monthly or quarterly bank statement; Statement of interest income from bank or agency.
- **Pay Check Stubs:** Current stub(s) covering at least two months and showing gross income.
- **Pension and Annuities:** Copies of current check; Annual statement from pension plan.
- **Self-employed:** Federal Tax Forms 1040 and Schedule C; Two recent bank statements showing personal income.
- **Social Security:** Copy of current check(s); Notification from bank of direct deposit.
- **Supplemental Security Income (SSI):** Notice of Planned Action; Notification from bank of direct deposit.
- **Supplemental Security Payment (SSP):** Notice of Planned Action; Notification from bank of direct deposit.
- **Student Aid:** Financial Aid statement from College or University.
- **Support from an individual:** Copy of check and statement signed by person providing support.
- **Unemployment Benefits:** Copy of current check; Printout from Employment Development Department.
- **Veteran's Benefits:** A letter indicating receipt of Veteran's Pension; Copy of VA check.
- **Other Sources of Income:** Documentation of other money received by your household and used to pay your monthly bills.

**PLEASE NOTE:** Unaltered documents should be submitted. Originals can not be returned.